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Steadily rising through the world of wealth management

By Leo Almazora

Kyle Johnson wasn't even done with his undergraduate studies when he first stepped into the world of finance. While studying economics at York University, he worked as a teller at one of the chartered banks.

"As I grew my career through working at banks, it became clear that I had an affinity to the investment side of the balance sheet," he said. "The ever-changing environment of wealth management is a challenge that keeps me engaged every day."

And as his work provided valuable real-life experience, it also gave him a chance to apply fundamental concepts in behavioural finance. Realizing that people are not as rational as traditional economic frameworks assumed, he started to "present clients with helpful information that responds to their incentives and ultimately to help them achieve their financial goals."

That lesson still resonates with Johnson, who now works as a licensed associate investment advisor with Alexandra Horwood and Partners at Richardson GMP. He primarily builds, monitors, and rebalances portfolios for clients — a challenge he finds especially rewarding as part of a group to whom people entrust their financial well-being. But while the pursuit of returns is undoubtedly a critical part of clients' best interests, he and other advisors in the firm are helping them by providing a more big-picture perspective.

"As financial advisors to our valued clients, we need to always be on the cutting edge of the investments and strategic advice that we can offer to them," he said. "We have been proactively recommending impact investing through allocating capital to clean energy and healthcare investments and other investment managers that have a mandate to invest in a socially responsible manner."

Johnson is relatively new to the industry — he's going into his sixth year in the advisory business —but his reputation as a competent investment professional has already secured him a place among Wealth Professional's Young Guns of 2017. While the early start to his finance career was undoubtedly a valuable springboard, he said his experiences at his current position has been key to his professional success so far.

"Starting in the wealth management industry with one of the most successful teams in the country has enabled me to learn a lot about the industry," he said. "We operate on a massive scale that has exposed me to a multitude of different investment opportunities and relationships. At the same time, the team fosters an environment of learning and personal development."

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